



Focusing on Individuals and Interactions

The Rebirth of Performance
Assessments

Copyright 2018 All Rights Reserved. Indra A. Books

Session Agenda

- ▶ Introductions (10 min)
- ▶ Performance Assessments (10 min)
- ▶ Value Statements (10 min)
- ▶ Goals (20 min)
- ▶ Corporate Alignment (10 min)
- ▶ Closing Activities (15 min)

Learning Objectives

At the end of the session, participants will have:

- ▶ Identified the pros and cons of the assessment methods by discussing current practices in their environments and documenting the positive and negative impacts of those practices.
- ▶ Identified the pain points within their own teams by discussing and documenting common reactions to annual reviews.
- ▶ Chosen Value Words for the team by completing the “Explain and Explore” exercise.
- ▶ Transformed Value Words into Value Statements by completing a team writing exercise.
- ▶ Illustrated personal, team, and business goals by simulating a team-building exercise for writing goals.
- ▶ Documented strategies to make performance assessments team-centric instead of person-centric by comparing traditional individualized goals with the newly-written team goals.
- ▶ Developed strategies to encourage corporations to adopt a more team-focused approach to goal setting by comparing the team values and goals to Agile value and corporate values.
- ▶ Established actionable next steps with accountability measures by using lessons learned during the session to formulate an action plan.

Introductions

Who am I? Who are you?

Indra A. Books

Certified Agile Coach

- ▶ Email: indrabooks@gmail.com
- ▶ Skype: iabooks or +1 410 941 8702
- ▶ EU: +34 680 50 10 07
- ▶ US: +1 571 426 6594



I am

- ✓ I work in (insert industry)
- ✓ I typically serve the role of...
- ✓ I am attending the conference because...
- ✓ This session interested me because...
- ✓ Success at the end of this session is...

Performance Assessments

Why do they leave such a bad taste?

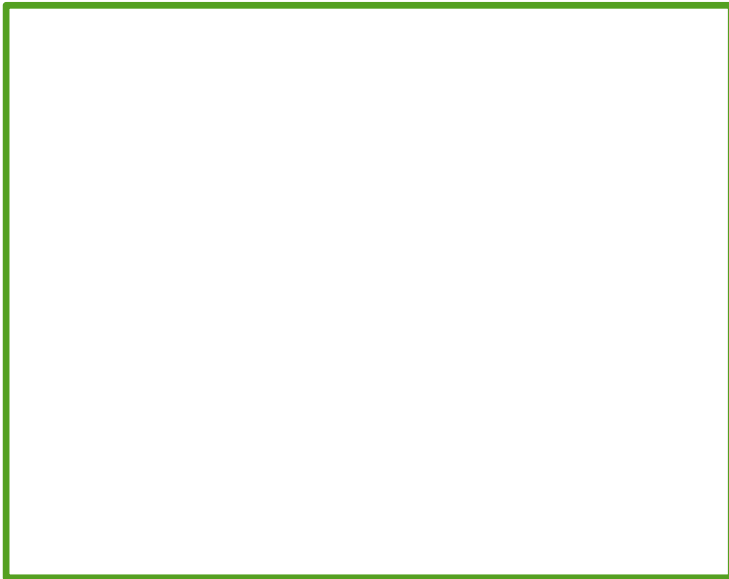
Where is my organisation now?

- ✓ What type of performance assessment or review do you do now within your organisation?
- ✓ How often?
- ✓ What is the corporate objective?
- ✓ Who manages the process and outcomes?
- ✓ Are pay raises or bonuses tied to this process?

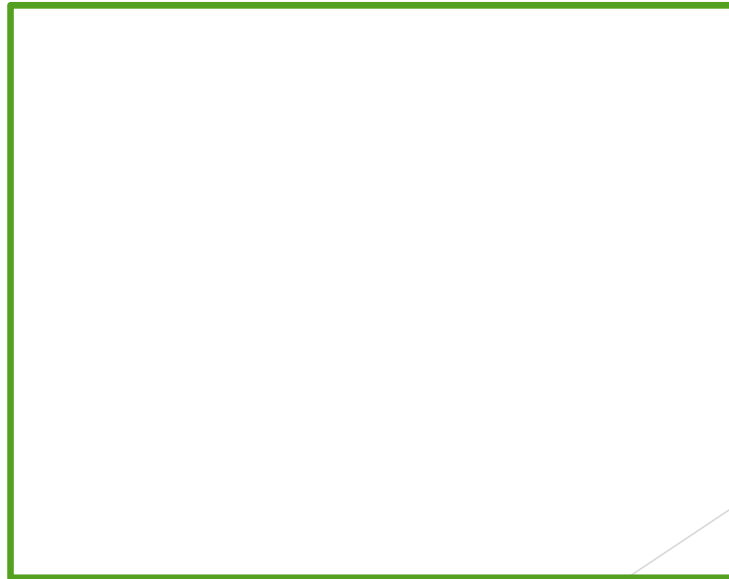
Your Answers:

Your Current Performance Assessments

Pros

A large, empty rectangular box with a green border, intended for listing the pros of current performance assessments.

Cons

A large, empty rectangular box with a green border, intended for listing the cons of current performance assessments.

How do your teams feel about the current process?

Value Statements

What is important to us as a team?

Value Delivery

Scrum is a team-based approach to delivering value to the business. Team members work together to achieve a shared business goal. The Scrum framework promotes effective interaction between team members so the team delivers value to the business.

Once the team gets a business goal, it:

- ▶ Figures out how to do the work
- ▶ Does the work
- ▶ Identifies what's getting in its way
- ▶ Takes responsibility to resolve all the difficulties within its scope
- ▶ Works with other parts of the organization to resolve concerns outside their control

This focus on team responsibility in Scrum is critical.

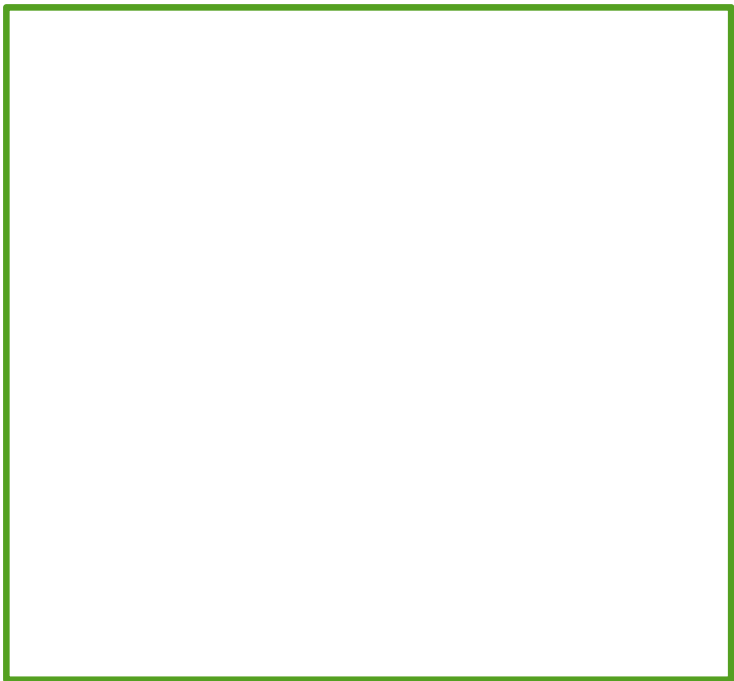
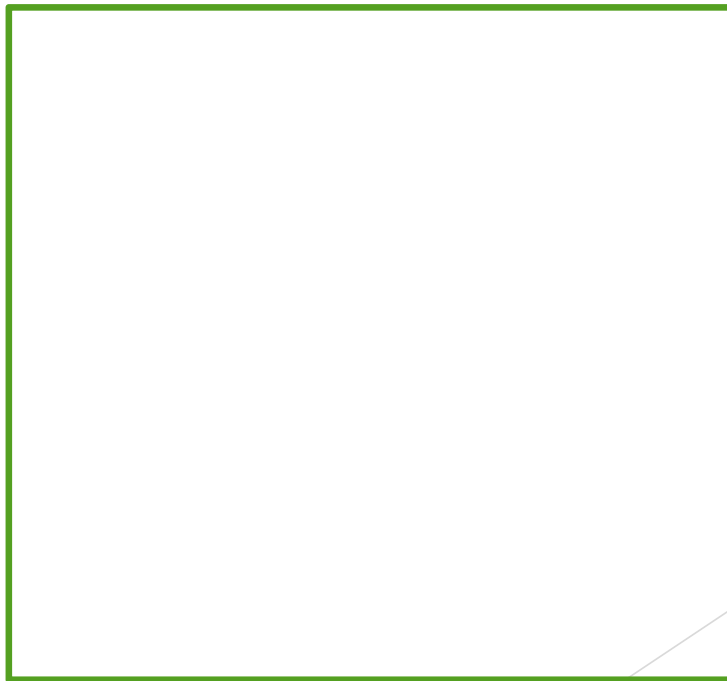
(Scrum Alliance)



Value Exercise: Explain and Explore

- ▶ Using the list of words, choose 3 words that have value to you. Write each word on a separate paper/card.
- ▶ Find one person in the your group and explain why your word has value to you.
- ▶ Your partner will explain their word as well.
- ▶ Exchange cards with your partner.
- ▶ Explain how that word resonates (or doesn't) with you.
- ▶ Repeat with new partners and the cards you now have.
- ▶ Attempt to talk to every person in the small group.

Team Value Words

An empty square box with a green border, intended for writing team value words.An empty square box with a green border, intended for writing team value words.

Team Value Statements (see examples)





Goals

Business, Team and Personal Goals

Using SMART to Write Goals

S

M

A

R

T



Specific



Measurable



Attainable



Relevant



Time Based

Writing SMART Goals - Example

Broad Goal: I want to write a business book.

- ▶ Specific: I will write a book about social media that is a minimum of 150 pages.
- ▶ Measurable: I will write one chapter per month, or three to five pages per week.
- ▶ Attainable: I will work on the manuscript first, and once that is completed, I will begin to search for a publisher or explore self-publishing.
- ▶ Relevant: Writing a book on social media will help me establish myself as an expert.
- ▶ Time-Based: My manuscript will be completed and ready to be published in 10 months.

SMART Goal:

In order to establish myself as an expert, I will write a 150-page book on social media by writing one chapter per month (or three to five pages per week). The book will be completed in 10 months, and then I will search for a publisher or explore self-publishing.

<https://www.thebalancesmb.com/smart-goal-examples-2951827>

Use your GPA - Goal, Purpose, Action

Goal (What will we do?)	Purpose (Why do this?)	Action Plan (How do we get there?)
Improve estimating on user stories	Increase Productivity	<ol style="list-style-type: none">1. Review backlog in advance.2. Have SME available for ??3. Ask questions4. Speak up if not sure about task5. Ensure all understand values when estimating

Business Goals

What goals do we have as a team to support our business or customer mission?



Team Goals

As a team, what do we want to achieve, how do we want to grow?

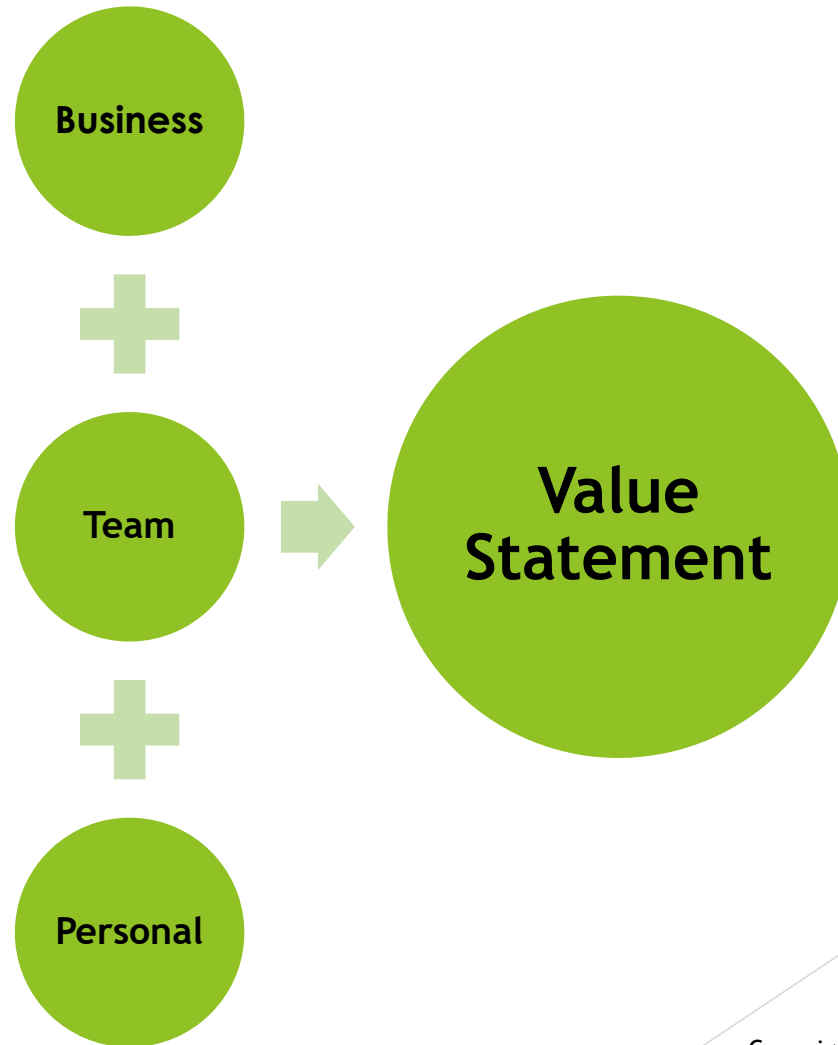
- ▶ Make sure your team goals align with your value statements.
- ▶ What are you trying to accomplish as a team?

Personal Goals

How do I as an individual want or need to grow to support the team?

- ▶ Make sure your personal goals align with your value statements

Goals, no matter what type, should always align with the values of the group



Corporate Alignment

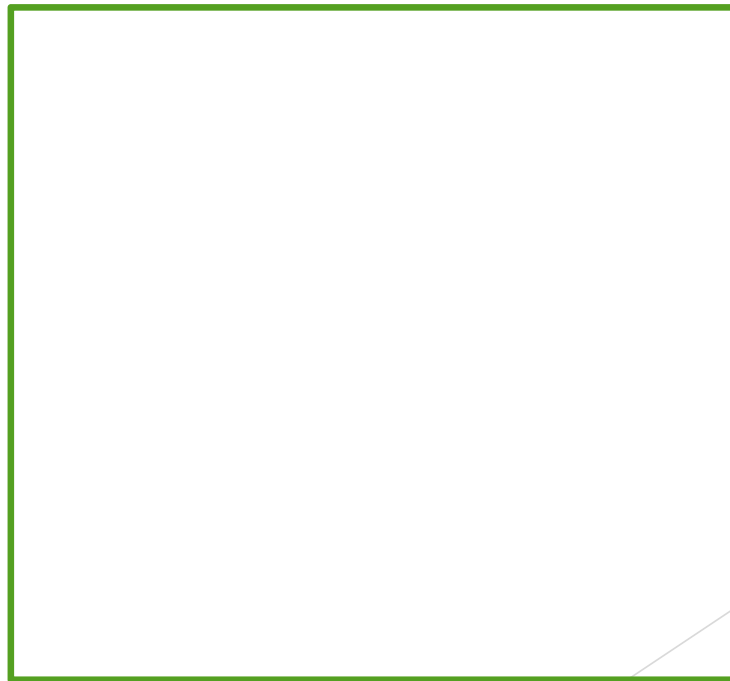
How do we, as agile teams, align with the corporate concept of goals?

Types of Corporate Goals

What emotions do these types of goals invoke?

- ▶ Increasing profitability
- ▶ Improving work quality
- ▶ Winning back lost customers
- ▶ Improving training process
- ▶ Increasing revenue

What do corporations want? Why do they require assessments?



Evaluating or Assessing Team Goals

How do we show the connection between the team's goals and the corporate perspective?

What do we want performance assessments to be in the future?



Closing Activities

Where do we go from here?

What will I do next?

I will _____ so
that _____.

- ▶ Your action statement
- ▶ Another action statement

Retrospective

- ❖ What did I learn?
- ❖ What did I wish I had learned?
- ❖ What will my journey look like from here?
- ❖ How will I be accountable for my defined action items?